

Analysis of the reimbursed psoriasis market in Hungary between 2007 and 2011

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Background and methodology

Psoriasis is a chronic immune-mediated disease that causes skin cells to grow too quickly, resulting in thick, white, silvery, or red patches of skin¹. Psoriasis can have a serious impact on a person's quality of life and daily activities². In addition, patients with severe psoriasis may have shorter life expectancies³.

The aim of this study is to analyze the epidemiology and the market characteristics of the psoriasis patients in Hungary.

Data were derived from the Hungarian National Health Insurance Fund (OEP) database. The analysis covers data of pharmaceuticals with health insurance reimbursement and medical services between 1 January, 2007 and 31 December, 2011 regarding all the psoriatic patients. Psoriasis treatments include different type of topical treatments, UV therapy, various oral and injected medications and biological-based therapies.

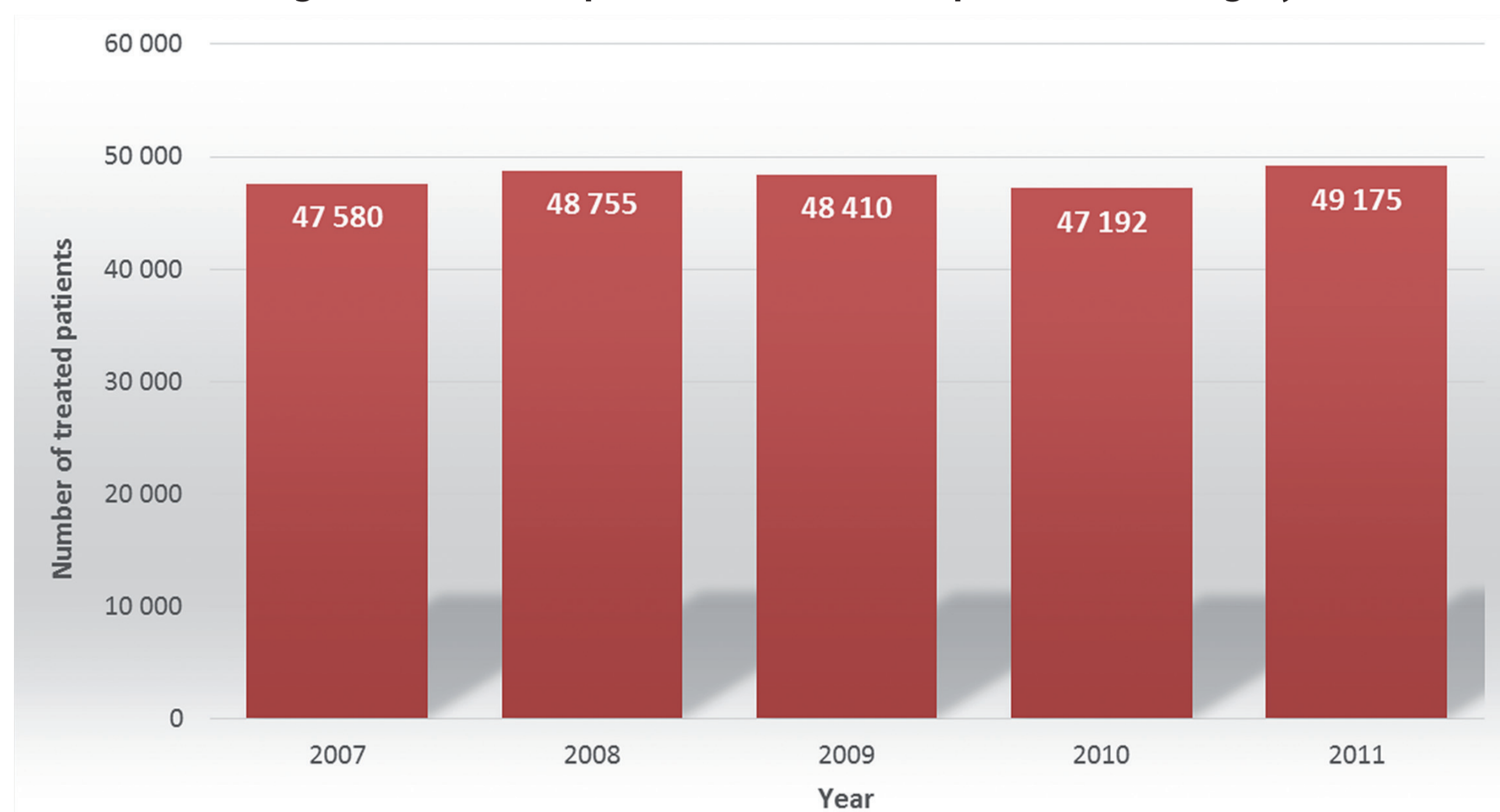
The main limitation of our analysis is that we only include patients who get at least one reimbursed pharmaceutical during the analyzed period. Those patients, who are treated with only non-reimbursed drugs (for example: with OTCs or homeopathic products) are excluded.

Epidemiology

Based on epidemiological data, the number of patients with psoriasis in Hungary is approximately 140 000 – 200 000 and the use of biological treatment is indicated for 150-200 patients per year⁴.

Our analysis suggests that only one in three (25-35%) psoriasis patients are treated per year by at least one reimbursed drug. The total number of patients is stable: there are approximately 50 000 persons treated by anti-psoriasis products.

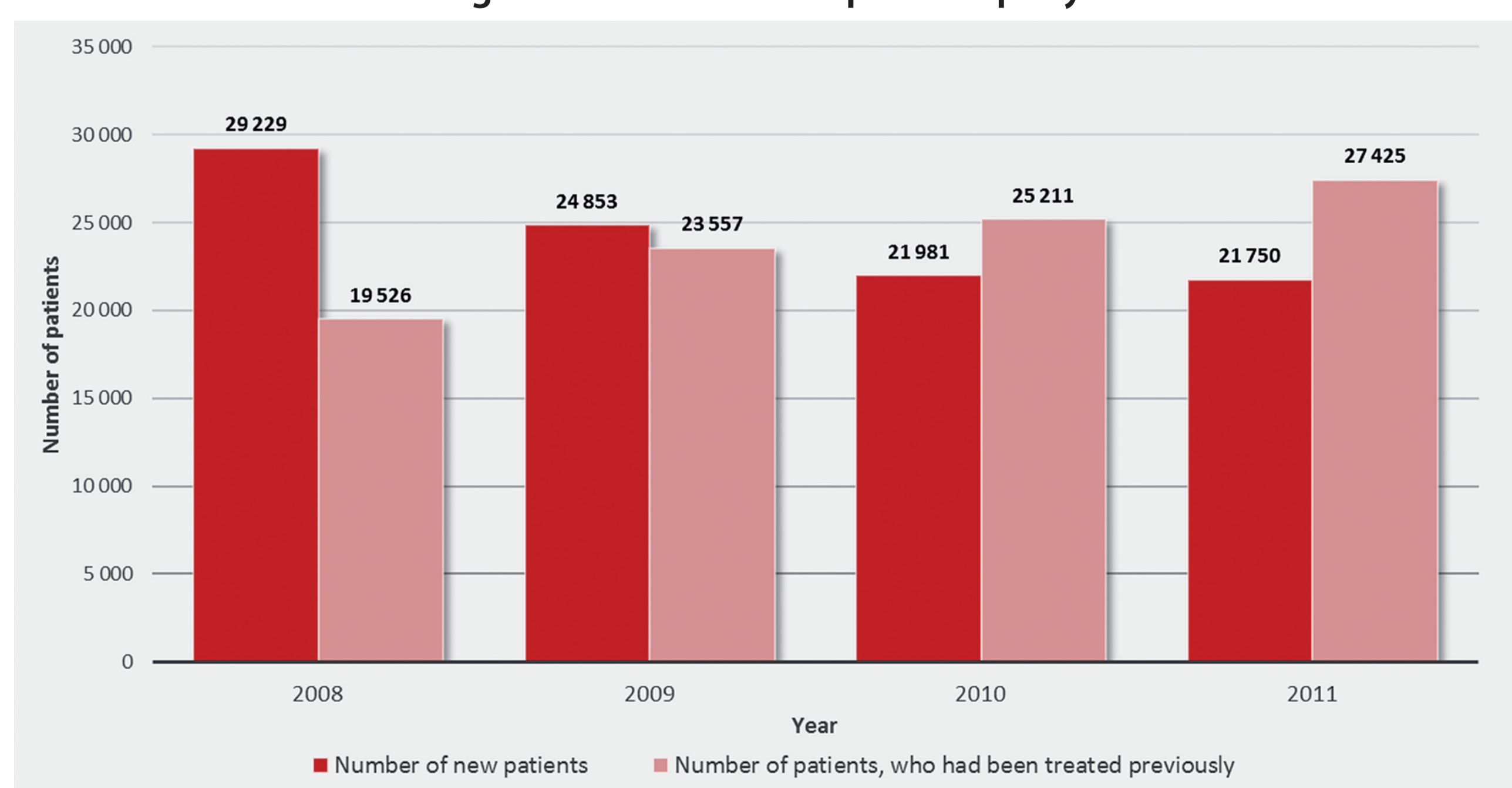
1. Figure: Number of patients treated with psoriasis in Hungary



Source: Hungarian National Health Insurance Fund (OEP) database.

The figure below shows the number of new patients who had been treated for the first time in 2008, 2009, 2010 or in 2011. Patients are considered new patients when they had not been treated for psoriasis before the particular year within the time frame of the analysis.

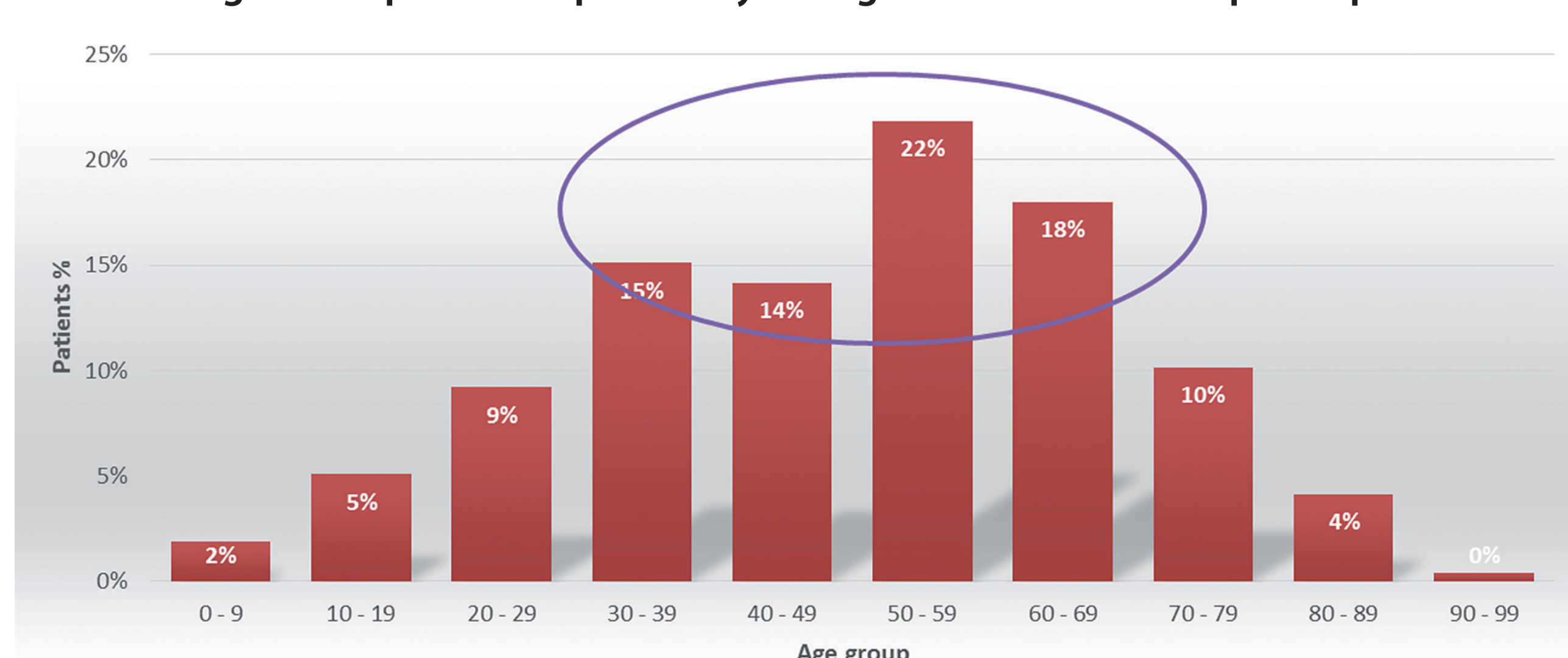
2. Figure: Number of new patients per year



Source: Calculation based on the Hungarian National Health Insurance Fund database.

The following figure demonstrates the proportion of patients by age at the time of the first redeemed prescription for psoriasis indication. In this patient population, middle-aged patients (aged from 30 to 69) are over-represented (sum: 69% of the total examined population). 22% of patients treated with psoriasis are 50-59 years old which can be explained by the characteristics of the disease. Based on the data, the prevalence among young and elderly people is negligible (2-4%).

3. Figure: Proportion of patient by the age of first redeemed prescription



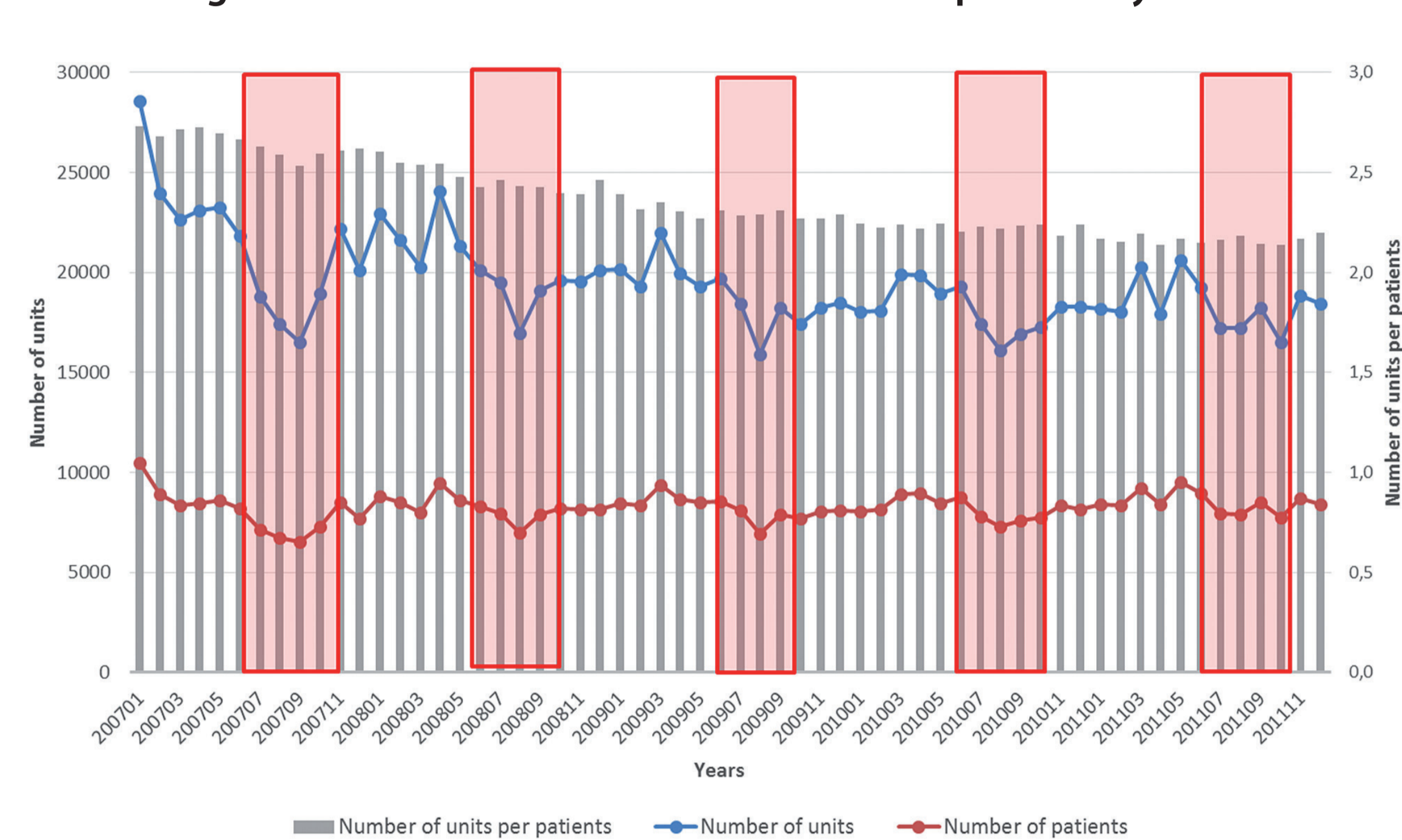
Source: Calculation based on the Hungarian National Health Insurance Fund database.

The gender ratio is balanced during the analyzed years. Although the proportion of woman is a bit higher: 52% compared to 47%. In conclusion there is no significant difference in the proportion of genders within the analyzed years.

Market size

Figure 4 demonstrates the number of sold units and the number of patients by month. The number of redeemed units vary in time but periodicity can be perceived in this tendency. A smaller decrease can be observed in every year between July and September, except in 2011 when the number of sold units starts to grow and then decreases again during this specific period. **Therefore, we can assume that the bought number of units will decrease during summer because sunlight can reduce the incidence rate of symptoms.** It is also important to emphasize that the degree of this decrease becomes smaller from time to time. The highest number of sold units can be observed between March and May.

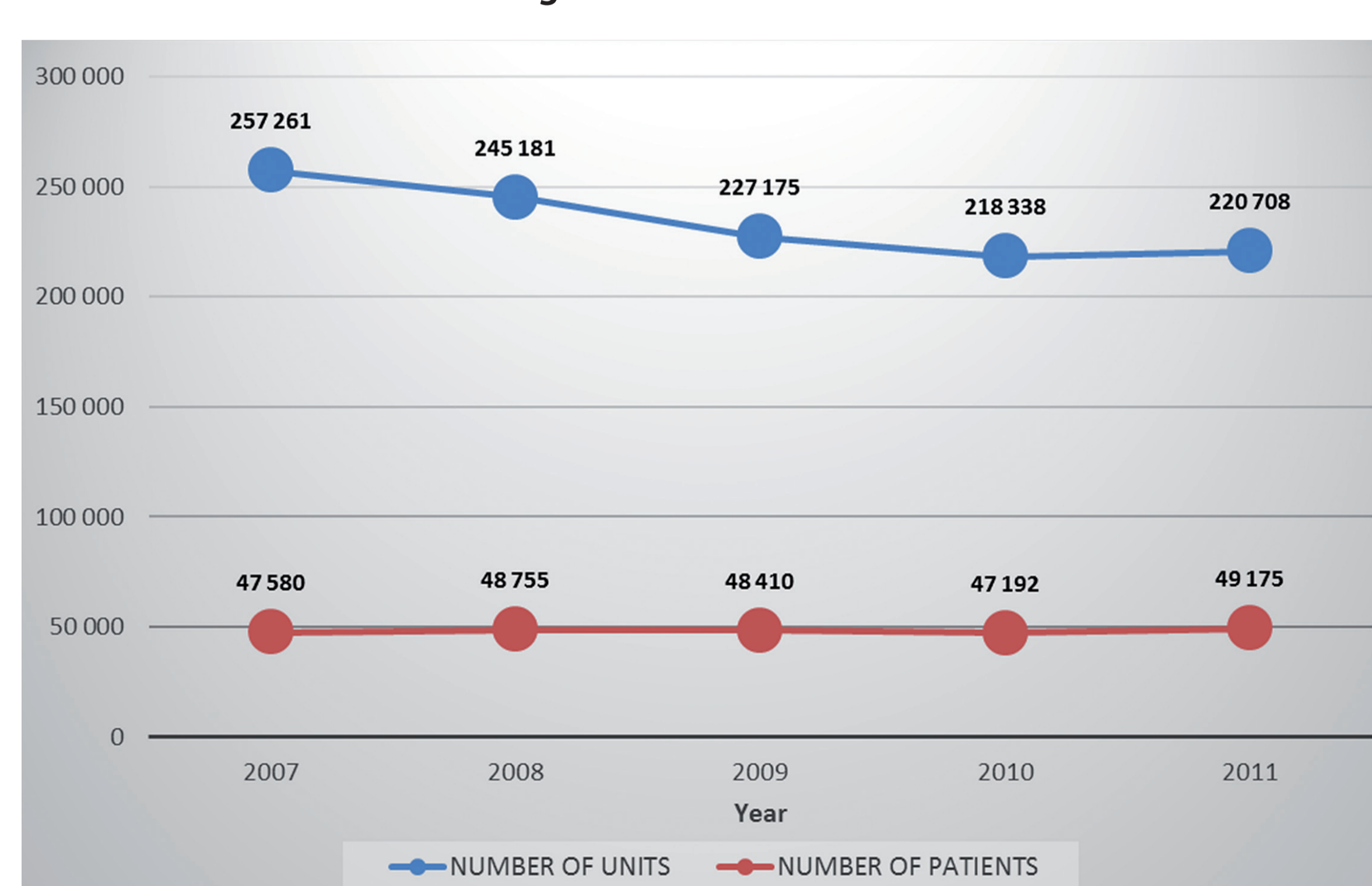
4. Figure: Number of sold units and number of patients by month



Source: Hungarian National Health Insurance Fund database.

The next graph shows the total market size between 2007 and 2011. Considering the number of units, we can observe a significant (-15%) decrease of almost 40 000 units (from 257 000 to 220 000). The number of patients stagnated. Because of this progress, the number of units per patient decreased during the analyzed period.

5. Figure: Total market share



Source: Hungarian National Health Insurance Fund database.

The introduction of biological-based therapies has had a great impact on the market of psoriasis treatments. Several biological therapies have emerged over the past few years for psoriasis. Recently, the spending on biological-based therapies in Hungary is approximately 13.5 million EUR. Since the use of biological-based therapies, the turnover of all reimbursed medicines has increased by approximately eight times⁵.

Conclusion

In conclusion, the Hungarian market is very steady and stable. The wide range of used psoriasis medicines suggests that patients are disappointed and they are trying "everything" to find solution for their problems. Due to the fact that psoriasis is a complex disease of the skin and immune system, there is a strong need for a holistic approach to treating psoriasis.

The limitation of our study is that we can use only the OEP's database which includes information only about the reimbursed market. Unfortunately, we have no possibilities to get data from the non-reimbursed sector.

References

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